

DEPARTMENT OF ADMINISTRATIVE SERVICES

Milwaukee County



October 21, 2022

To All Interested Program Managers

Project: Milwaukee County Capital Project Management – Adjunct Staff

Project No.: TBD

Subject: REQUEST FOR PROPOSALS (R.F.P.)

Milwaukee County Department of Administrative Services is requesting proposals for professional consulting services to support the execution of capital projects funded by the Milwaukee County capital budget. This request is for Project Manager/Owner's Representative (PM) services to function as adjunct staff to supplement our current Architecture, Engineering & Environmental Services (AE&ES) staff.

The scope of work will include:

- a. Provide resources and act as project manager and owner's representative for projects, or bundles of projects, where Milwaukee County determines that additional project management support is required.
 - i. Be the independent advocate and advisor for Milwaukee County to coordinate activities of the project team, manage project costs, identify and mitigate risks, accelerate project delivery and optimize value for Milwaukee County.
 - ii. Support all phases of project execution – including design, construction, commissioning, move-in, startup, and close-out.
 - iii. Work closely with the Milwaukee County project team and Client to coordinate all bidding, contracting, design and construction activities, manage relationships, seek efficiency in all phases of the project, provide reports, and monitor/assure contractor compliance with Milwaukee County TBE, residency, record-keeping and reporting requirements.

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It is Milwaukee County's intent to enter into an agreement with the successful proposer to provide the complete range of services as outlined in this RFP. Milwaukee County will deem the selected consultant team qualified to perform these services for a period of three years from notice of selection with the opportunity to extend in one year increments a fourth and fifth year if mutually agreeable to both parties.

I. BACKGROUND

Within the County capital program, the AE&ES section of DAS-FMD is responsible for managing over 200 active capital projects with value exceeding \$200M. At the same time, we have a generational influx of additional capital funds to be managed: the County has allotted \$116M of American Rescue Plan Act (ARPA) funds for capital projects, and we anticipate dozens of projects will be assigned to AE&ES to administer.

The AE&ES section of DAS-FMD is currently experiencing a staffing shortage due to retirements of key personnel over the past several years, combined with a difficult hiring market. Retirements have and will sap the organization of long-standing incumbents. Within the next 1-4 years, we anticipate the possible retirement of up to 12 additional valued team members. Temporary loss of capacity has become a key issue.

The Facilities Management Division has been working to address this situation since last year. We have taken the following approach to manage our current and anticipated workload:

1. Working with the County Executive's office and leaders of County departments, we developed a 12-step project prioritization scheme, and assigned priority ratings to all active capital projects. We then allocated our resources against all high priority projects and placed some lower priority projects on 'HOLD'. (At this time we have only 22 projects on HOLD.)
2. For ARPA-funded capital projects, we have contracted with an external consultant to set up and operate a Program Management Office, work with Client departments to assist in project execution, and provide additional project management resources to assign to projects as needed.
3. For the first time in over 20 years, we are working through a major reorganization of AE&ES with all our team members to increase our efficiency, productivity, and Client focus. This reorganization will result in new roles and responsibilities within the organization but will take some time to fully play out.

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4. Supplement current staff with temporary help to work through project backlog and address upcoming capital projects for which we have insufficient internal project management staff.

This RFP intends to address this fourth leg of our strategy. Because AE&ES is insufficiently staffed for the current load of capital projects, this RFP seeks external resources to supplement current staff and address our backlog.

II. POTENTIAL PROJECT SCOPE

Projects under consideration for adjunct PM staff include:

Item #	REQ DEPT	Project Number	Project Name	DESIGN or CONSTRUCTION or BOTH	TOTAL FUNDING	NOTES
1	FMD	WS13101	McGOVERN SC ROOF	DES/CONSTR	\$150,000	
2	FMD	WO189-20161	CH ADA RESTROOM	CONSTR	\$368,975	
3	PARKS	WP56901	WASHINGTON PK SERV YARD	DESIGN	\$823,883	
4	ZOO	WZ119	ZOO ELEPHANT LSS	DES/CONSTR	\$250,000	project value estimated
5	WMC	WO517101	WMC RESTROOM	DES/CONSTR	\$370,647	
6	ZOO	WZ135011	ZOO REPTILE	DESIGN	\$37,211	
7	WMC	WO52401	WMC GALLERY WINDOWS	ASSESS/DESIGN	\$40,001	
8	WMC	WO56201	SAARINEN STAIRWAY	ASSESS/DESIGN	\$100,023	
9	ZOO	WZ160-20164	ZOO ADMIN BLDG ROOF	DESIGN	\$312,934	
10	FMD	WC18601	SB WINDOW/FAÇADE ASSESS	ASSESSMENT	\$277,909	
11	SHERIFF	WO72201	INMATE PROCESS	DESIGN	\$41,915	

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			HOLD CELL			
12	PARKS	WP682-21212	WHITNALL PK GOLF CLUBHSE	DESIGN	\$167,205	
13	PARKS	WP050-19604	LINCOLN BASEBALL LTG	CONSTR	\$43,904	
14	DOT-MCTS	WT05901	MASS TRANSIT LIGHTING	DESIGN	\$48,598	
15	DOT-MCTS	WT08001	MCTS FLEET MAINT LIGHTING	DESIGN	\$41,413	
16	DOT-MCTS	WT11401	FDL GARAGE LTG IMPROVE	DESIGN	\$197,517	
17	DOT-MCTS	WT012201	FDL GARAGE LTG IMPROVE	CONSTRUCTION	\$921,129	
18	PARKS	WP56601	DRETZKA PARK ELIM H VOLT	DESIGN	\$144,009	
19	PARKS	WP73501	ATKINSON PARK LIGHTING	DES/CONSTR	\$80,000	
20	PARKS	WP73601	SHERMAN PARK LIGHTING	DES/CONSTR	\$75,000	
21	FMD	WC22701	CH ELEV MODERNIZATION	DESIGN	\$585,174	
22	ZOO	WZ017601	ZOO AVIARY AIR CONDITIONING	CONSTRUCTION	\$1,647,950	2023 Capital Budget
23	DHHS	WS012401	SEC YOUTH FACILITY PHASE 1	DES/CONSTR	\$31,200,000	total funding awaits State grant Q1 2023
			TOTALS		\$37,925,398	

With just two exceptions, all the above projects have been funded and are ready to move forward. The two exceptions are:

ITEM 22 - WZ017601 Zoo Aviary Air Conditioning

This project has approved funds for design which is currently in progress. Construction funding awaits final Board approval of the 2023 County Capital Budget in November, with funds available in January.

ITEM 23 - WS012401 Secure Residential Care Center for Children and Youth

This project awaits State grant funding, which has been approved by the State legislature but is pending State Building Commission approval in December. Using existing funds available for the project, the design and construction team has been contracted and is moving forward with design, in full anticipation of State grant funds receipt in Q1 2023.

III. SCOPE OF PROJECT MANAGEMENT SERVICES

The successful Consultant shall provide all services as specified per the standard terms and conditions of the Milwaukee County Department of Administrative Services Consultant Agreement for Professional Services (Type C) (see Attachment D) along with the following:

1. GENERAL REQUIREMENTS

- a. The Consultant selected for this program shall assign a Program Manager to manage and administer the required services and staff. This Program Manager shall consult with the designated County representatives, monitor staff progress and work quality, and address any issues that arise within the Consultant project team.
- b. Prior to initiation of work, the selected Program Manager shall confirm with Milwaukee County the general scope and intent, timetable, points of contact and deliverables for each Project. The Program Manager is not expected to be involved in day-to-day activities but should be familiar enough with the program to provide support on an as-needed basis as well as providing a single point of contact and contract oversight for the Consultant.
- c. Level of project management services will vary between projects. Prior to initiation of work, the scope of Project Management services shall be jointly determined by Owner and Program Manager and each assignment shall be documented and approved by Owner using a Service Order as shown in Attachment E.
- d. In the Scope of Services below, the term 'Project Manager' is used generically and in the singular tense. While a single Project Manager is desirable on each project from beginning to end, some projects may require the use of more than one resource to cover the complete scope of work. Proposers shall include all available and/or potential resources in their proposal for consideration.
- e. Each project requires its own separate accounting, and Consultant invoices shall itemize costs by project.
- f. All work under this contract shall conform to all applicable State and County code requirements, as well as Owner department processes.
- g. The Consultant shall include under their contract any sub-consultants that may be required based on the project scale, type of facility and specialized functions. These consultants, along with their expertise and level of participation shall be indicated in the Consultant response to this RFP. Management of the services of any sub-consultant shall be the responsibility of the Consultant.

2. SCOPE OF SERVICES for the Project Manager

The Scope of Services for each Phase of a project managed by an assigned Project Manager are shown below, broken down by tasks related to Phases such as:

- A. **Intake and Planning Phase**
- B. **Design Phase**
- C. **Construction Phase**
- D. **Relocation Phase**
- E. **Project Close-out Phase**

Project Phases and tasks may overlap or lag each other as the overall project develops, and the Project Manager shall adjust their work structure accordingly. Detailed requirements for each Phase are shown below. The scope and sequence of services can be negotiated at any time, and the County may apply internal resources as needed to address the needs of the County and the program. Some services listed in this RFP may not be required, and Milwaukee County reserves the right to initiate additional procurement action for any of the services included in this RFP.

In the sections that follow, ‘Owner’ shall mean the Director of AE&ES or their designee. ‘Client’ shall mean the representative(s) of the County Department originally requesting the capital project. ‘PM’ shall be the Project Manager from the Consultant staff assigned to any particular project.

A. Intake and Planning Phase

The Consultant shall:

1. Work with Owner to develop a complete understanding of the project assignment, including identification of the project Client and the project delivery method/contracting strategy (which may include traditional design-bid-build, construction management at risk (CMAR), Job Order Contracting (JOC), or time and materials (T&M)).
2. Attend meetings with Owner and the project Client to develop a mutual understanding of the assigned project, identify roles and responsibilities, and develop working protocols and standards for the execution of the project.
3. Complete the development of Client project goals and objectives, including financial objectives and controls, schedule, sustainability, relocation and timing requirements,

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records and reporting, and Client department key success factors. Produce and maintain a “Project Charter” which documents the full scope, goals and objectives of the project.

4. Produce and maintain a “Responsibility Matrix” which addresses and identifies all active roles for key individuals and entities involved in the project. Include design consultants, County Construction Coordinators, County Project Assistants, and County Subject Matter Experts as indicated by Owner.
5. Further develop and maintain the “Project Risk Matrix” which addresses and identifies all constraints and risks presented in the project. Initiate risk mitigation measures as needed to assure project success.
6. Throughout the course of the project, the PM shall use the County’s Unifier web-based project management information system to maintain and update project files, schedules, milestones, costs, reports and other information as agreed with County. County shall grant PM an active license to access the Oracle Primavera Unifier Project Management software system (Version: 19.2 b-01302019-17).

B. Design Phase

The PM shall:

1. As needed, develop design consultant’s scopes of work, prepare requests for proposals for services of professionals; solicit and review proposals from such professionals; assist in the preparation of contracts for the retention of such professionals; and recommend selection of such professionals. Review/negotiate, with Owner and its legal counsel, scope and fee revisions within professional service agreements and help resolve disputes relating to such scope revisions with such professionals, which may include:
 - a. Architect and Engineers
 - b. Contractor(s)
 - c. Specialty consultants and contractors
2. Verify that the milestone schedule requirements and other known and reasonably foreseeable steps necessary to perform and complete the project have been included and/or accounted for within the contract documents.
3. If required by the Owner, develop a project specific Project Management Plan. If not required implement a generic PMP based on typical industry standards.
4. Develop a strategy, procedure, and schedule to assist the Owner in obtaining the required reviews and approvals of authorities having jurisdiction over the Project; and assist the

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Owner in connection with the Owner's responsibility for filing documents required for such approvals.

5. Implement, maintain, and update as necessary, the County's Unifier web-based Project Management Information System to be used to receive, distribute, and maintain Project Reports, Project Schedules, and other information as agreed and under license with the Owner.
6. Implement, maintain, and upgrade as necessary, a web-based File Sharing System to be used to receive and distribute Project Reports, Project Schedules, and other information as agreed with the Owner.
7. Provide financial control of the project including the following:
 - a. Verification and management of the overall project budget.
 - b. Preparation of construction estimates for the conceptual design, schematic design, design development, contract document phase, individual bid packages and proposed Change Orders.
 - c. Prepare cost estimates for Owner's Costs (including professional services, fees, technology, FF&E and move costs).
 - d. As needed, develop a capital cost estimate to support Client department requests that may be part of the annual County budget process in the form and format required by Owner.
 - e. Prepare a cash flow analysis based on the latest information and update as necessary.
 - f. Prepare an overall project budget that includes an Owner's Reserve and update as necessary.
8. Work with Designer to develop Program and Conceptual Design.
9. Review the plans, drawings, specifications and such other documents as prepared by the equipment and design professionals for cost, constructability, adherence to schedule and consistency with the program. Confer with and advise the Owner of variances and recommendations for corrective actions to remedy any problematic issues. Assess and advise the Owner of impacts to the project budget and project schedule.
10. Participate in value engineering exercises and evaluate proposed building design systems as to quality, first cost and life cycle cost, constructability, union jurisdiction, and availability.
11. Consult with the Owner regarding issues which impact the constructability and feasibility of the project.
12. Identify all Owner's costs and responsibility line items (such as professional services, FF&E, specialty items, and relocation services) and work with Owner and Client

departments to develop a procurement strategy and plan. Identify long lead time items and recommend to the Owner methods of procurement to achieve the project schedule.

13. Prepare an evaluation and recommendation for each general and specialty contract award and submit in a timely manner to the Owner for approval.
14. Expedite approvals and coordination issues between state and local agencies to obtain any required permits, licenses and other approvals for the project.
15. Verify that the milestone schedule requirements and other known and reasonably foreseeable steps necessary to perform and complete the project have been included and/or accounted for within the contract documents.
16. Schedule and attend all design review meetings and review the design professional's agenda and minutes for accuracy and correct any errors within such documents.
17. Conduct design plan quality review at each stage of design development (Schematic Design, Design Development, and Construction Drawings).
18. Work with the Owner's and Developer's design teams to develop a Project Commissioning Plan in accordance with responsibility matrix and team engagement plan.
19. Conduct periodic progress meetings with the Owner, the Client, and the appropriate design team members, contractors, equipment designers and suppliers, and other owner consultants and vendors. PM shall prepare and distribute exhibits and supporting information for meetings as required. PM shall prepare and distribute agendas and minutes for each project coordination meeting, which shall include updates on status of scope, schedule, budget, project issues, items requiring Milwaukee County or third-party input, and deliverables.
20. The PM shall prepare a Monthly Progress Report, which will relate to the status of the project, throughout the duration of the project. The report shall include the following:
 - a. Executive Summary – include a summary of financial status, highlights of major events, risks and risk mitigation, and a schedule summary.
 - b. Status of Design – summarize design activities and identify known and potential delays.
 - c. Status of Construction – summarize construction activities and identify known and potential delays.
 - d. Status of Relocation – summarize Relocation plan and activities and identify known and potential delays.
 - e. Status of Close-out – summarize Project Close-out activities and identify known and potential delays.
 - f. Status of Owner's Items – summarize status and plans for items to be completed by the Owner (including professional services, fees, FF&E and move costs).

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- g. Budget Status Report – include a Master Project Budget which will include a summary of anticipated costs and status of scope changes that are approved, pending, and/or anticipated.
 - h. Schedules – include an updated Milestone Project Schedule.
 - i. Anticipated Project Activity – indicate, in narrative form, the activities of the project in the upcoming month, actions to be taken during the period, and any scheduled governing agency reviews/approvals, etc.
 - j. Other – include such additional or revised information as required by the Owner.
21. The PM shall regularly monitor, track and report contract compliance with County Targeted Business Enterprise (TBE) requirements using the County B2G-Now web-based application, not only for their own compliance, but also for all other consultants and contractors under contract with County for this project. Work with Milwaukee County Community Business Development Partners (CBDP) staff, contractors and consultants to ensure payments to subcontractors are properly documented and meet CBDP goals. Issue goal compliance deficiency warning letters to consultants and contractors as necessary.
22. The PM shall regularly monitor, track and report contract compliance with County Residency requirements using the County LCP-Tracker web-based application. Work with Milwaukee County DAS A&E staff and contractors to ensure contractors are meeting residency requirements. Issue goal compliance deficiency warning letters to contractors as necessary.
23. Review all applications for payment from Owner’s consultants, designers and engineers and provide recommendations to Owner for approval/revision/rejection.

C. Construction Phase

The PM shall:

1. Establish bidding schedules, develop and/or assemble construction bidding documents, and assist the Owner with the issuance of construction bid packages.
2. Coordinate and conduct, with the assistance of Owner and design team, pre-bid conferences with prospective bidders. Assist the Owner and design team with regards to questions from bidders and issuance of addenda.
3. Assist the Owner in the receipt and evaluation of bids. Prepare bid analysis as needed.

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4. Monitor and coordinate the activities of the design professionals, construction manager, and other consultants and vendors for the completion of the work in accordance with the Owner's objectives for cost, schedule and quality.
5. Schedule and conduct and/or attend pre-construction, construction and progress meetings to discuss matters of procedures, progress, problems and scheduling of the construction phase of the project.
6. Review and update the Milestone Project Schedule monthly.
7. Periodically monitor the progress and performance of the design professionals, construction manager, specialty consultants and contractors and other vendors. Give notice and recommend courses of action to the Owner if the contractual requirements of the above-mentioned entities are not being fulfilled.
8. Work with Owner and Client departments to execute the procurement strategy and plan for all Owner's items. Identify long lead time items and recommend to the Owner timing of procurement to achieve the project schedule. Develop and execute an installation and testing plan and schedule as required for Owner's items, and update such as required to coordinate with facility construction activities.
9. Develop and maintain project files to include a record copy of all contracts, drawings, specifications, addenda, change orders and drawing modifications, shop drawings, product data and samples, handbooks, manuals and instructions and related materials for Owner's FF&E.
10. Review accuracy of all invoices for Owner's FF&E and other items, and provide recommendations to Owner for approval/revision/rejection.
11. Review and update the Master Project Budget monthly.
12. Recommend to the Owner necessary or desirable changes to the project; review requests for changes by design professionals, construction manager, specialty contractors and consultants, and equipment vendors; assist in negotiating proposals; determine whether changes are necessary, reasonable and accurate; and submit recommendations to the Owner for approval.
13. Review applications for progress payments and final payments, and all documents in support of such applications and make the appropriate recommendations to the Owner.
14. Assist in obtaining required governmental and regulatory agency permits or approvals, fee waivers (if applicable), and resolving code or regulatory disputes required for the work. Advise the Owner of potential delay impacts to the Milestone Project Schedule in this regard.

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15. Monitor and confirm that the design professionals and construction manager maintain the following documents: a record copy of all contracts, drawings, specifications, addenda, change orders and drawing modifications, shop drawings, product data and samples, handbooks, manuals and instructions and related materials required to be kept and maintained for the project.
16. Assist in coordinating all aspects of the work with any public agencies or utility companies involved in the project.
17. In the event that the interpretation of the meaning and intent of the contract documents becomes necessary during construction, ascertain the design professionals' interpretation and transmit such information, along with Owner's Representative's analysis and recommendation to Owner.
18. Review the adequacy of supervision, personnel and equipment and the availability of necessary materials and supplies. Where adjudged inadequate, recommend that the necessary actions be taken to correct the deficiencies.
19. Coordinate deliveries, installations and testing of Owner's items.
20. Monitor and review the design professionals' and the Developer/Contractor's quality inspection control system so that the required standards of construction are achieved.
21. Monitor the design professionals' and the Developer/Contractor's review of all testing required by the technical sections of the specifications and applicable codes and regulations for compliance with the contract documents.
22. Monitor the flow of all documents and materials for proper sequence of approvals so as not to delay the progress of the work.
23. Review the design professionals and contractor's recommendations for all scope change requests from the trade and specialty contractors. Submit recommendations to Owner for approval.
24. Review all scope changes proposed by the design professionals and Developer/Contractor and make recommendations regarding practicality, costs and effect on the schedule.
25. Monitor all scope changes during construction to ensure compliance with approved revisions.
26. Conduct periodic progress meetings with the Owner, the Client, and the appropriate design team members, contractors, equipment designers and suppliers, and other owner consultants and vendors. PM shall prepare and distribute exhibits and supporting

information for meetings as required. PM shall prepare and distribute agendas and minutes for each project coordination meeting, which shall include updates on status of scope, schedule, budget, project issues, items requiring Milwaukee County or third-party input, and deliverables.

27. The PM shall prepare a Monthly Progress Report, which will relate to the status of the project, throughout the duration of the project. The report shall include the following:
- a. Executive Summary – include a summary of financial status, highlights of major events, risks and risk mitigation, and a schedule summary.
 - b. Status of Design – summarize design activities and identify known and potential delays.
 - c. Status of Construction – summarize construction activities and identify known and potential delays.
 - d. Status of Relocation – summarize Relocation plan and activities and identify known and potential delays.
 - e. Status of Close-out – summarize Project Close-out activities and identify known and potential delays.
 - f. Status of Owner’s Items – summarize status and plans for items to be completed by the Owner (including professional services, fees, FF&E and move costs).
 - g. Budget Status Report – include a Master Project Budget which will include a summary of anticipated costs and status of scope changes that are approved, pending, and/or anticipated.
 - h. Schedules – include an updated Milestone Project Schedule.
 - i. Anticipated Project Activity – indicate, in narrative form, the activities of the project in the upcoming month, actions to be taken during the period, and any scheduled governing agency reviews/approvals, etc.
 - j. Other – include such additional or revised information as required by the Owner.
28. The PM shall regularly monitor, track and report contract compliance with County Targeted Business Enterprise (TBE) requirements using the County B2G-Now web-based application, not only for their own compliance, but also for all other consultants and contractors under contract with County for this project. Work with Milwaukee County Community Business Development Partners (CBDP) staff, contractors and consultants to ensure payments to subcontractors are properly documented and meet CBDP goals. Issue goal compliance deficiency warning letters to consultants and contractors as necessary.
29. The PM shall regularly monitor, track and report contract compliance with County Residency requirements using the County LCP-Tracker web-based application. Work with Milwaukee County DAS A&E staff and contractors to ensure contractors are meeting residency requirements. Issue goal compliance deficiency warning letters to contractors as necessary.

30. Review all applications for payment from Owner's consultants, designers, engineers and contractors and provide recommendations to Owner for approval/revision/rejection.

D. Relocation Phase

If a relocation is required for the Project, the PM shall:

1. Work with the Owner, its Client departments, and the County Information Management Services Division (IMSD) to develop an overall project plan for relocation from existing locations to the new site. The Relocation Plan shall include, but not be limited to:
 - a. key contacts,
 - b. lists of materials, equipment and personnel,
 - c. Continuity of Operations,
 - d. relocation sequence, means and methods,
 - e. safety and other special requirements,
 - f. training requirements,
 - g. cost, and
 - h. schedule.

Review the Relocation Plan with Owner and Client departments; update and publish.

2. Per the developed Relocation Plan and to the extent required by the owner, assist/prepare: requests for proposals for services of professionals; solicit and review proposals from such professionals; recommend selection of such professionals; and assist in the preparation of contracts for the retention of such professionals. Review/negotiate, with Owner and its legal counsel, scope revisions within professional service agreements and help resolve disputes relating to such scope revisions with such professionals.
3. Continuously review all scope and schedule changes proposed by the design professionals, Developer and construction contractors and make recommendations regarding practicality, costs and effect on the Relocation Plan.
4. Monitor status of facility construction and commissioning, FF&E installations and special requirements to coordinate such with the Relocation Plan. Ensure that the Developer/Contractor and equipment vendors coordinate equipment and systems training sessions for the Owner's personnel.
5. Provide constant contact with Client departments as needed to assure safe and smooth relocations.
6. Manage communications, coordination, planning, and decision-making for the move contract service provider(s) and Client departments.

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7. Work with the Owner, its Client departments, and the County Information Management Services Division (IMSD) to develop an existing facility decommissioning plan. This plan shall include, at a minimum:
 - List and description of locations to be vacated and decommissioned.
 - Target end state for each decommissioned location. Identification of key issues and environmental factors to be considered.
 - Identification of Decommissioning Team members, and a matrix of responsibilities.
 - Budget and schedule for decommissioning.
 - Decommissioning action plan.
8. Project Manage the activities of the Decommissioning Team through substantial completion of the decommissioning action plan.

E. Project Close-out Phase

The PM shall:

1. Develop the protocol and conduct a comprehensive final inspection of the project to verify that the materials furnished and work performed are in accordance with the contract documents.
2. Receive from the Developer/Contractor and deliver to the Owner all guarantees, warranties, operating and maintenance manuals required by the contract documents.
3. Monitor the design professionals' and contractors' procedures for expediting the preparation of "as-built" and record drawings and operations and maintenance manuals in accordance with the specifications.
4. Review applications for final payments, and all documents in support of such applications and make the appropriate recommendations to the Owner.
5. Provide a detailed and comprehensive final account report to include verification that all final lien waivers are received.
6. Participate in a final project debriefing meeting as may be scheduled by County.

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3. QUALITY CONTROL

Milwaukee County reserves the right to request partial or full reimbursement from consultants for change orders resulting from errors and omissions in the services they are contracted to provide.

4. ANTICIPATED PROJECT TIMETABLE

Contract Bidding and Award

1. <i>October 31, 2022</i>	Issue Request for Proposal
2. <i>Nov 7, 2022, 2:00 p.m.</i>	Pre-proposal Meeting
3. <i>November 23, 2022, 2:00 p.m.</i>	PROPOSALS DUE
4. <i>December 2, 2022</i>	Selection Committee complete review of submitted proposals
5. <i>Week of December 5, 2022</i>	Interviews (if necessary)
6. <i>December 9, 2022</i>	Selection Committee selects Program Manager
7. <i>December 20, 2019</i>	Consultant Retention award signed-off
8. <i>January 3, 2023</i>	Execute a contract with selected consultant

Program Execution

9. <i>January 3, 2023</i>	Initiate program
10. <i>December 31, 2025</i>	Termination of program

5. PRE-PROPOSAL MEETING

There will be an optional pre-proposal meeting at 2:00 p.m. on Monday November 7, 2022. This will be a virtual meeting held via MS-Teams. Milwaukee County staff will provide an overview of the program and be on hand to answer questions about this RFP. Contact the author of this RFP to receive an invitation to the virtual meeting.

6. RELATED WORK BY OTHERS

A. The County will make available the following files and documents:

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In addition to the specific attachments to this RFP, our Administrative Manual of Operating Procedures can be made available upon request.

7. PROPOSAL CONTENT

The proposal shall conform to Milwaukee County's Proposal Preparation, Submission and Evaluation Guidelines (see Attachment A). The proposal shall include the Consultant Proposal Form (see Attachment B) and the following information:

- A. **Cover:** Include project number and name, project location, consultant's name, address, telephone number, FAX number, e-mail address, proposal date, etc.
- B. **Table of Contents:** Include an identification of the material by section and page number.
- C. **Letter of Transmittal:** The name and description of the organization submitting the proposal briefly stating the proposer's understanding of the service to be provided.
- D. **Organization's Experience:** Include a list of similar projects that the organization has participated on in the past five (5) years. Attach a separate sheet for each project, up to five (5) maximum, giving a brief description of each project and the organization's participation.
- E. **Project Organization and Staff Experience:** Include an organizational structure of the project team, including the relationship of any sub-consultants to be used for this project. The name and title of the Program Manager who will be in charge of this project. Provide a resume' for each individual involved in the project, and include their name, title and/or duties for the project, professional registration, relevant certifications, a brief description of related experience including time contribution in this capacity to past projects, and qualifications. **Please identify the specific individual(s) that would be assigned to project WS012401 Secure Residential Care Center for Children and Youth.**
- F. **Sub-Consultants:** Indicate the names and addresses of any sub-consultants and/or associates proposed to be used in this project. State the capacity they would be used in and the approximate percentage of the total services they would provide. Also state their past experience in the field.
- G. **Project Approach:** Discuss how you would plan to on-board your assigned project managers and orient them to County protocols and integrate them with the County AE&ES team. Provide a description of planning, architectural and engineering, construction coordination or other issues you anticipate in this project and how you propose to overcome them. Discuss how you plan to staff the project to efficiently complete the work effort. Also, please indicate the earliest availability of staff based on the Program Execution date listed above in Section 4.

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- H. Scheduling:** Base proposal on schedule provided in this RFP.
- I. Constant Effort:** Using Attachment B, include a spreadsheet/matrix listing the names, classifications, and hourly rates for personnel that may be assigned as Project Manager (or other roles) for projects and scope of work as described in this RFP.
- J. Fee Proposal:** A specific fee proposal will be required for each project assigned to the Consultant during this program and shall be documented using the attached form of Service Order (Attachment E).

8. PROPOSAL EVALUATION

See the attached Milwaukee County Proposal Preparation, Submission and Evaluation Guidelines for the evaluation criteria. Proposers must recognize this is not a bid procedure, and a Professional Services agreement will not be awarded solely on the basis of the low fee proposal. Milwaukee County reserves the right to accept or reject any and all proposals, issue addenda, request clarification, waive technicalities, alter the nature and/or scope of the proposed project, request additional submittals, and/or discontinue this process.

9. GENERAL REQUIREMENTS

A. TARGETED BUSINESS ENTERPRISE (TBE) REQUIREMENTS

Community Business Development Partners (CBDP) is responsible for monitoring and enforcing the Milwaukee County Target Enterprise (MCTE) Ordinance for inclusion of small business. Target firms include DBE firms certified under the Wisconsin Unified Certification Program following Federal regulations, WBE and MBE certifications from the State of Wisconsin DOA, SBE firms certified by Milwaukee County, and SBE firms meeting SBA size standards and listed in the SAM directory.

Meeting TBE project participation goals may be achieved utilizing any combination of TBE firms, whether DBE, SBE, MBE, or WBE. There are no percentage goals assigned directly to any of the types of firms. This allows for increased participation by providing opportunities for multiple certifications to be included in the project. **TBE Prime's will receive credit towards the goal for work they self-perform.**

Targeted Business Enterprise (TBE) participation goal for this RFP is 14%. To be considered for this project, you must submit a *Subcontractor/Sub-consultant/Supplier Information Sheet* (TBE-02) with your Proposal listing all sub-consultants as well as signed *Commitment to Contract with TBE* (TBE-14) forms, one for each of the TBE firms included to meet participation. TBE-14 form(s) must identify (1) the TBE firm by

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name and address, (2) the scope of service(s) to be provided, (3) the dollar amount and (4) the percentage. The form is first completed and signed by the Prime, then forwarded to the TBE sub-consultant for signature in the affirmation section. Signatures must occur in the proper date order sequence, or the form may be considered non-responsive. CBDP is entitled to reject your Proposal for improperly completed forms. If you are not able to meet the goal, you must submit the TBE-01 Good Faith Effort for your proposal to be considered responsive.

CBDP may be contacted at 414-278-4851 or cbdpcpliance@milwaukeecountywi.gov for assistance in identifying TBE firms and understanding the County's TBE Program.

Following are the links to Directories for firms eligible for credit:

DBE <http://wisconsindot.gov/Pages/doing-bus/civil-rights/dbe/certified-firms.aspx>

MBE WBE <http://www.doa.state.wi.us/Divisions/Enterprise-Operations/Supplier-Diversity-Program>

Milwaukee County SBE <https://mke.diversitycompliance.com/Default.aspx>

SAM Directory for Federal SBE <https://www.sam.gov/portal/SAM#1>

Adherence with prompt payment requirements is monitored through information entered into the Diversity Management and Compliance System, utilizing B2GNow software. Prime consultants are required to report payments received from the County and amounts paid to sub-consultants. Subs will receive an automated email requesting them to confirm the amounts and whether the terms of the prompt payment policy were complied with. There is no cost to the Prime or any sub-consultant, the only requirement is to become a registered user and complete the one hour webinar training. The County will enter the Primes contract, and the Prime will enter all sub-consultants, including both TBE and non-TBE firms.

The Targeted Business Enterprise (TBE) Utilization Specifications and forms to be used are included in the RFP (Attachment G).

- B.** Selected Consultant shall follow Milwaukee County Code of Ethics as follows: No person(s) with a personal financial interest in the approval or denial of a Contract being considered by a County department or with an agency funded and regulated by a County department, may make a campaign contribution to any County official who has approval authority over that Contract during its consideration. Contract consideration shall begin when a Contract is submitted directly to a County department or to an agency until the Contract has reached final disposition, including adoption, County Executive action, proceeding on veto (if necessary) or departmental approval.

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- C.** Communication initiated by a proposer to any County official, employee or representative evaluating or considering to proposals, prior to the time of any award is prohibited unless at the explicit direction of the RFP Contact/Project Manager and any such unauthorized communication may constitute grounds for rejection or elimination of a proposal from further consideration, in the sole discretion of the County.
- D.** The successful consultant must be an Equal Opportunity Employer.
- E.** The proposal shall conform to all attached documents. All proposals should use this RFP and its attachments as the sole basis for the proposal. The issuance of written addenda are the only official method through which interpretation, clarification or additional information will be given.
- F.** All costs for preparing a proposal, attending the selection interview if required, or supplying additional information requested by Milwaukee County, is the sole responsibility of the submitting party. Material submitted will not be returned.
- G.** The proposal must be submitted in a single bound 8-1/2" x 11" document, as well as via an emailed pdf document.
- H.** With the signing and submission of a statement or proposal the submitting consultant certifies that the standard terms and conditions of the Agreement for Professional Services (that will be used to contract with the selected consultant) has been read and understood and that the submitting consultant is ready, willing and able to sign the agreement when requested without making any substantive changes.

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Please provide **three (3)** paper copies and one pdf version of your proposal no later than **2:00 P.M. on November 23, 2022** to Director of Facilities Management, Milwaukee County Department of Administrative Services, Facilities Management Division, 633 W. Wisconsin Avenue, Suite 1000, Milwaukee, Wisconsin, 53203 (Telephone (414) 278-4940, email stuart.carron@milwaukeecountywi.gov).

Please direct questions regarding this RFP to me using the contact information provided above.

Sincerely,

Stuart Carron

Director, Facilities Management Division
Department of Administrative Services
Milwaukee County
stuart.carron@milwaukeecountywi.gov

Attachments:

Attachment A – Proposal Preparation, Submission and Evaluation Guidelines
Attachment B - Proposal Forms
Attachment C – sample standard agreement *Milwaukee County Department of Administrative Services Consultant Agreement for Professional Services (Type C)*
Attachment D - Targeted Business Enterprise (TBE) Specifications and Form
Attachment E – sample form of Service Order
Attachment F – Guideline for Reimbursable Expenses
Attachment G – Required Invoice Format
Attachment H – not used
Attachment I – Record Documents Standards
Attachment J – Subconsultant Listing
Attachment K – Subconsultant Compliance Certification

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cc:

S. Hayes, DAS-FM

W. Banach, DAS-FM

K. Dunne, DAS-FM